

Project Managers' Advisory Group

MINUTES December 20, 2010

Attending:

(* = by phone)

Bob Giannuzzi	EPMO
Janet Stewart	EPMO
Charles Richards	EPMO
Jesus Lopez	EPMO
Linda Lowe*	EPMO
Gaye Mays*	EPMO
John Correllus	OSP
Angela Bondar	ITS
Sandra Hewitt	ITS
John O'Shaughnessy	ITS
Lucy Cornelius*	DPI
Ellen Zimmerman*	DHHS DPH
Sarah Joyner*	ESC
Lawrence Sanders*	ESC
Jodi Bone*	ESC
George Fenton*	DOJ
Lloyd Slominsky*	Dept. of Corrections
Cheryl Ritter*	DOT
Kenneth Kirchner*	DOT
Colleen McCarthy*	SOS

Bob Giannuzzi welcomed everyone to the meeting. First time attendees included Kenneth Kirchner, Angela Bondar, and Sandra Hewitt.

Bob solicited and received approval of the November minutes.

Jesus Lopez proudly presented Angela Bondar, Sandra Hewitt, and Janet Stewart congratulatory letters from the SCIO in recognition of their recent passing the PMP exam.

Jesus reported that the recently completed PMP Exam Prep Class students will be receiving a CSAT survey soliciting their feedback. He advised that the next session is tentatively slated to start in April with over 30 candidates on the waiting list.

Bob reviewed the condensed PMP certification PDU categories that go into effect in March. He also reported the following upcoming events at NCPMI (since updated):

NCPMI Venue	Speaker	Date/Topic
General Membership	Vicky Kumar	<u>January 20</u> (6:00 PM) Project Managers As Creative and Innovative Leaders

Public Sector LIG		No meeting scheduled
PMO Committee		<u>January 19</u> (5:30 PM) Understanding and Motivating Project Team Members
Leadership Committee		No meeting scheduled
Information Systems Committee		No meeting scheduled

The progress of the EPMO work groups was discussed next.

- **SDLC** to address integration of alternate SDLCs (e.g., Agile) into the current process/workflow. Linda Lowe and Gaye Mays reported that the group's charter was finalized. Proposals to streamline both Agile and waterfall processes were reviewed w/Doug Banich, who will take them to his architecture oversight group. They will also review them w/ITS management and then Kathy Bromead.
- **Agency Procurement** to develop a common (within agency) procurement process. Lucy Cornelius and Cheryl Ritter reported that the final process document was to be reviewed at their next meeting on 12/21.
- **Business Case** to develop guidelines and provide training on justifying projects based on cost/benefits analysis. Bob Giannuzzi has scheduled a group kickoff meeting on 1/3. Anyone wishing to participate should contact Bob.

Lucy reported on Methodology Task Group activity. She reported that the group released the Project Sponsor Approval of Acceptance Criteria and GO/NO GO Implementation Decision document. The group will next focus on updating the O&M Transition Plan documentation and developing a DR checklist.

Charles Richards reported that he held a session of CR training as an Adobe Connect webinar on 12/15. There were about 15 participants. He'll repeat this module in January as well as another session on status reporting.

Janet Stewart advised that the recent process update is now available on the EPMO website. The changes are highlighted in the EPMO newsletter.

Charles reported on the PPM hardware refresh activity. The current VM environment that was refreshed on 11/5 successfully passed a recent ITS DR exercise.

Bob invited John Correllus, OSP CIO, to share as a best a Project Charter document that was developed while he was at the Department of Commerce. John reviewed the highlights of a completed document. The template will be sent out with these minutes.

Lessons Learned from recently closed projects are included in the Appendix.

Meeting adjourned at 4:20 PM.

NEXT MEETING

Monday, January 24, 2011 at 3:30
333 Six Forks Road Conference Room 5 or (919) 420-1375 (new)

<https://its.ncgovconnect.com/r96139571/>

APPENDIX

Lessons Learned Documentation

Exhibit A

ESC Chapanoke Expansion

Planning & Design Phase:

Topic	Lessons Learned
1. Updated Procurement Plan	<p>ESC experienced difficulty deciding on a telephony solution for the Chapanoke facility. Initially, ITS provided quotes for the EIPT VoIP Telephony solution as a service offering. ESC anticipated a short term lease on the building and wanted to determine the most cost effective method to provide a temporary telephone service. ESC worked with ITS to develop business requirements and released a bid for proposals. ITS provided the best value vendor selection and ESC installed a standalone VoIP AVAYA solution. It would have been easier to make a decision and complete the process if both solutions had been presented at the same time as viable options. It appeared that once the bid was released the bid only the vendor responses became an option.</p> <p>A headset, amplifier, and analog recording system were provided to the vendor for testing. The combination worked successfully for the Appeals staff (phase I). The second phase of the project involved adding Adjudication staff to the Chapanoke location. There was some confusion on the use of the headsets without an amplifier and additional testing was conducted by UI Tech staff. In future building expansion projects, it would be beneficial for the purchasing entities to look at the equipment in use at the facility and make changes to the configuration after additional testing.</p>
2. Training Room	<p>UI Adjudication estimated that there would be room for 32 people in the training room. After the room was outfitted with tables, chairs, telephones, and computers it was determined that only 16 people could fit into the room comfortably with training materials. It would have been beneficial to set up the room several weeks ahead of the planned training to eliminate the last week training restructure and room utilization.</p> <p>The training room at Chapanoke was new and it did not have any furniture, PCs or telephones. UI had additional PCs available but additional telephones to dedicate to the training room had not been ordered. The staff telephones were relocated from the</p>

	new user cubicles to accommodate the training room and the staff relocated their telephones when training was completed. It would be beneficial in future projects to discuss the utilization and expectations for office space common areas.
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Implementation Phase:

Topic	Lessons Learned
1. Training (user, admin, etc)	The vendor provided ADMIN training on the phone system for 5 people. Based on ESC IS Helpdesk feedback the training was not comprehensive and the management software was not working properly. The vendor and ITS provided additional training and software to IS staff. The administration of an AVAYA VoIP stand alone system was new to ESC. The ESC central office currently utilizes the ITS EIPT AVAYA VoIP services. It may be beneficial in the future to include an impact assessment analysis to determine the effect on agency staff workload.

Exhibit B

ESC - UI Chapanoke Expansion – St. Mary’s Relocation

Planning & Design Phase:

Topic	Lessons Learned
1. Project Schedule / Milestones / Project Planning	The timeframe from Initiation to completion of Implementation for this project was very short. The project began on 9/8/2010 and implementation was completed on 11/1/2010. Staff from multiple areas (ESC UI, IS, SS and ITS) worked together to complete the project. The project team put in extra effort to meet the demanding schedule.
2. Other	

Execution & Build Phase:

Topic	Lessons Learned
1. Project Communication	<p>Project communications were laborious. Project staff (ESC and ITS) had communication directly with each other and made decisions and arrangements without including the project manager or project coordinator. Extra management efforts and impromptu discussions were required to uncover some of the project information. This resulted in extra work, unnecessary stress, and was a risk to completing the project. Both ESC and ITS staff contributed to the communication issues.</p> <p>ESC project team meetings were held weekly but were not well attended by IS or SS. A considerable amount of management effort was expended talking with the groups outside of the weekly meetings to gather information. Meeting reminders were sent out and the minutes were provided to ESC staff. Only a limited number of the staff reviewed the minutes, and provided feedback. Staff provided input only through direct questioning and did not openly provide information or correct misinformation.</p> <p>For future projects there needs to be increased focus on team building.</p>

Implementation Phase:

Topic	Lessons Learned
1. Managing Customer Expectations	The customer was alarmed at the physical condition of the Chapanoke basement area during their initial site visit. Existing cubicles were in disarray, trash was strewn throughout the area and one bathroom area was not functioning. The customer was asked to wait until MacThrift and the building owner had completed their work and they had moved in to create a punch list of items that needed to be addressed.
2. Vendor Management / Vendor Performance / Vendor Deliverables	<p>ESC and ITS staff were on site several days during the move and cut over to the ITS EIPT VoIP Telephony solution for the Chapanoke facility. Some of the items provided by ITS were received at the last minute and required flexibility by the ESC UI staff already located at Chapanoke and after hours work by the ESC IS staff.</p> <p>ITS continued to work through minor telephone issues until November 9th. Prior to project completion ITS and ESC entered into maintenance mode and did not communicate through the PMO or project coordinator on anticipated issue resolution activities.</p> <p>It was beneficial to the project to have ITS and ESC IS staff on site the first few days of cutover.</p>

General Comments:

Topic	Lessons Learned
1. Facilities/ Movers	<p>Several issues came up related to the move:</p> <ol style="list-style-type: none">1. Two telephones were broken during the move due to the packing and transport from St Mary's by MacThrift. It would be beneficial in the future to have the telephones boxed by ESC staff.2. The Chapanoke basement entrance was left unsecured: the doors were left open and the key was in door late into the evening Friday, October 29th. It would be beneficial to enforce more stringent security with future projects.3. Building electrician did not complete work as promised on October 30th. The cubicle vendor was required to return on-site on Monday, November 1st to complete their work. The electrician did not arrive until mid-morning Monday. Schedules and requirements need to be communicated more clearly to vendors.
2. Communications	<p>There was a lot of behind the scenes communications and planning. Although the project was successfully completed on schedule and over a very brief timeframe, project communications needed improvement.</p> <p>ESC and ITS staff need to support the concept of project management and ensure that communications flow through the project manager and coordinator.</p>

Exhibit C

ITS - Remote Office Backup Infrastructure

Initiation Phase:

Topic	Lessons Learned
1. Business Case / Project Charter	Took a long time to get charter finalized due to un-concise scope. PMs in agency continue to see vague scope descriptions and need to ensure they keep project on

	track to deliver only formally approved scope.
2. Benefits	Need to keep on sponsors to document out benefits in sufficient detail. Took many rounds to get them where they needed to be.

Planning & Design Phase:

Topic	Lessons Learned
1. Updated Benefits	Benefits relied upon re-purposing the Disk Storage Units that were used to spool information from Tape, but PM cannot influence storage group to actually perform the re-purposing of the disk storage units to realize the benefits. The amount of Disk Storage Units on the floor was dramatically understated in the original business case.
2. Updated Procurement Plan	The Project Procurement Plan update was based upon the use of the existing Storage 204J contract and depicted the competition among 204J vendors based upon documented storage requirements.
3. Managing Sponsor Expectations	Invited the Project Sponsor to participate in key Project decisions and milestones pro-actively.
4. Managing Customer Expectations	Attempted to involve the Business Relationship Managers (BRM) early-on to manage this aspect.
5. Project Schedule / Milestones / Project Planning	Representation from all affected Operations staff was key to the attempt to obtain buy-in for the Project Schedule/Milestones/and Project Planning in general.
6. ETS System Design Document	The early participation of the Architecture and Engineering Group resulted in a robust System Design Document.
7. Other	Data Domain training was successfully coordinated and conducted onsite for key project team members from the EDC and WDC.

Execution & Build Phase:

Topic	Lessons Learned
1. Project Approval Process	As a result of the previous PM vetting the system design document early in the project, the approval process for Gate 2 proceeded as planned.
2. Managing Sponsor Expectations	Discussed project's progress with the sponsor.
3. Managing Customer Expectations	Improvement could be made in this area. The BRM's need to understand the impact to the customer throughout the project.
4. Project Schedule / Milestones / Project Planning	Maintaining communications within the project team was key to keeping the schedule accurate and up to date.
5. Resource Management (internal & external resources)	Due to competing higher priority projects, some of the key project team members were pulled away from working on this project. Staying in contact with those resources was key to forecasting new task/milestone dates.
6. Vendor Management / Vendor Performance / Vendor Deliverables	Very little vendor involvement occurred during this phase of the project. The hardware was delivered as planned.
7. Project Communication	Maintaining active communications was key to the success of this project.
8. Change Management / Change Request	Understanding the resource constraints (as described above in Resource Management) led to the proper change requests being prepared and approved.
9. Testing (test execution, verification & validation, test scripts, test cases)	Testing the new technologies in the test lab was key to successful implementations at the client sites.
10. Requirements Verification & Validation	I would recommend more involvement from the Service Owner in this area.

Implementation Phase:

Topic	Lessons Learned
1. Project Approval Process	Due to prior planning as described in the Execution and Build Phase, the approval process occurred as planned.

2. Managing Sponsor Expectations	Discussed project's progress with the sponsor.
3. Managing Customer Expectations	The BRM's became involved during this phase. This was important to the success of the implementations.
4. Resource Management (internal & external resources)	Due to competing higher priority projects, some of the key project team members were pulled away from working on this project. Staying in contact with those resources was key to forecasting new task/milestone dates.
5. Vendor Management / Vendor Performance / Vendor Deliverables	The vendor was actively involved in addressing the licensing issues with the Data Protection Advisor software. Their involvement led to the successful implementation of the application.
6. Project Deliverables (refer to the list of deliverables in the PPM Tool that the PM said would be delivered)	Due to the length of this project, some of the initial deliverables defined have changed. The deliverables should have been revisited on an ongoing basis with management and the project sponsor.
7. Production Readiness (software / hardware, process, personnel)	As a result of proper planning, the project proceeded as planned.
8. Training (user, admin, etc)	Net backup PureDisk training was successfully coordinated and conducted by the vendor in a virtual environment.
9. Other	All communications with the customer needs to be shared with all team members.

General Comments:

Topic	Lessons Learned
1. Site Surveys	The site surveys to include the amount of data storage needed and the amount of bandwidth were conducted at the beginning of the project. These surveys needed to have been updated prior to rollout. The amounts of data for some of the sites had changed considerably which impacted the technology being rolled out to their site.
2. Equipment Procurement	The equipment was purchased almost a year prior to actual implementation. Recommend a review of policies and procedures to expedite the deployment of new technologies while still doing due diligence.